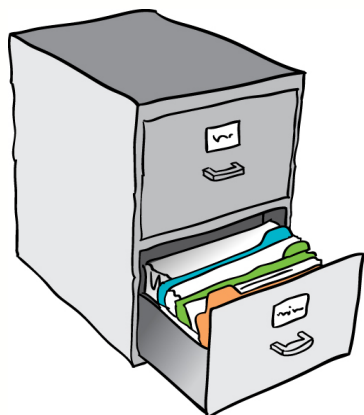# lesson 5 *set up your archive systems*

WELCOME BACK

Welcome to the second-to-last lesson of *Organize Your Paper Clutter*. Can you believe we're in the final stretch of this workshop? Are you making noticeable (and rewarding) progress toward the goals you set in Lesson 1? I hope you are. I hope you're doing great and that you're tickled pink with the progress you've made so far!

If it seems like you still have a long way until you reach your goals, that's okay. As I mentioned in an earlier lesson, paper clutter is one of the most time-consuming forms of clutter. Sorting paper is a really (really!) s l o w process. There are simply a lot of decisions to make and systems to set up! Wherever you are in the journey toward your goal, pause for a moment and take note of the *progress* you've made. Don't evaluate your progress as big or small, enough or not enough. Just note the progress you've made. Ah, yes…progress. It feels good, doesn't it?

Keep focusing on your progress and keep taking steps in the direction you want to go. Little by little you will get where you want to be: the land of flat surfaces, wide open spaces, and complete control over your paper! There are just a few more steps to take to get there. We'll take the next one in this lesson.

You have just one final paper category to tackle—your archive paper. In Lesson 5 you'll be learning about various archive systems and setting them up in your home. You'll follow the same process you used to set up your collection, action, and reference systems, and at this point, you've become quite a pro with that process! So let's get right to it!

SET UP YOUR ARCHIVE SYSTEM(S)

Reminder: what your archive system is for

It's been a little while since we've discussed archive systems, so let's start with a quick refresher. As we learned in Lesson 2, your archive paper is similar to your reference paper, but the holding period is longer. With archive paper, you won't want or need to retrieve your paper as frequently as any of your other paper. Because of this, there are special storage considerations to keep in mind, which we'll discuss shortly.

Also, like your reference paper, with archive paper there is no immediate action required on your part. If and when you need to access your paper, an external trigger will kick in and let you know. Because of this, you can file away archive paper without worry. Something external will tell you when it's time to get your hands on it again.

Examples of archive paper include old tax returns, legal documents such as birth certificates and your Social Security card, financial documents like stock certificates and receipts for big-ticket items, and memorabilia, art projects and school papers you're keeping for your children.

Step 1: Decide how many archive systems you need.

As with our other paper organizing systems, the first step is to define how many systems you will need to set up, and then specifically what paper will be stored each system. You may need only one system or you may need more. Don't worry, though, they're a cinch to set up. To do this, pull out your *paper, paper, everywhere* handout and your temporary sorting container filled with archive documents. With these two resources in hand, get a feel for what archive paper needs a home.

If you have an existing filing system that you haven't torn apart yet, now is a terrific time to do so. Before dismantling your current system, however, evaluate what is working well for you, and what needs improvement. As you consider your current system, make it a point to fix only that which is broken. If pieces or parts of your filing system are working well for you—make it your goal to keep them intact! If you have categories that make sense to you—keep using them! If you love your file cabinet and the drawers slide open easily—keep using it! Let's only fix what's broken with your archive systems, and let the rest be. Deal? Great!

Once you have a feel for what to change and what to keep intact with your current archive system, pull out the paper organizing process from Lesson 2. Use this process to reassess what paper to keep, what paper to shred, and what paper to recycle. Before creating a system for paper you don't really need to hold onto, pare down your archive paper using the paper organizing process. Once you've lightened your load of unneeded paper, decide what types of archive systems you'd like to set up. Here are some options.

POSSIBLE ARCHIVE SYSTEMS

Basic Filing System

A simple filing system stored in a file cabinet is a natural choice for your archive paper. Your archive paper isn't accessed as frequently as the other types of paper, and there's always an external trigger in place to tell you to retrieve a specific document. Because of this, even if you're an "out of sight, out of mind" person, a filing system can be an effective solution for archive paper.

Your basic archive filing system can be used to store documents like warranties and user manuals, monthly files for paid bills, resumes, school transcripts, medical records, pet vaccination records, and other similar documents.

Fire Safe or Safe Deposit Box

Use a fire safe or safe deposit box for your most important and hard to replace documents. Candidates for this type of archive system include legal documents like birth certificates, wills, powers of attorney and marriage certificates, financial documents like stock certificates, car titles and other property titles, as well as current insurance policies, your household inventory, and passports. You may also wish to store electronic versions of family photos on a flash drive or CD in your fire safe or safe deposit box.

Memorabilia System(s)

Your memorabilia system will likely have several components. For example, you may have scrapbooks for travel mementos, a memorabilia box or drawer for cards and letters, as well as binders for your children's school papers and artwork. Again, each person's paper situation is different. So set up organizing systems that suit your archive paper and your priorities.

> "Having trouble deciding what to put in your fire safe? Pull out "how long do I need to keep it?" from Lesson 2. Give priority to documents you'll keep permanently, those that are difficult to replace, or things that would be heartbreaking to lose."

everyday example: Aby's archive systems

My archive systems include a basic filing system, a small fire safe and three-ring binders for my kids' school memorabilia and artwork. I also have various scrapbooks and store cards and letters in an antique wooden box.

TAKE ACTION!

All that's left to do now is decide how many archive systems to create for your archive paper. Pull out your paper, paper, everywhere handout and your temporary sorting bin full of archive paper to aid in this decision making process.

Step 2: Select Your Storage Solution(s)

Due to the importance of your archive paper and the extended holding period, special consideration is required when selecting storage. But, as always, we'll start by considering location.

CONSIDER LOCATION

It's okay to store archive paper in a less convenient location than your other categories of paper which you access more frequently. But don't make your storage location too inconvenient. Remember my client who had her file cabinet in the garage? That location didn't work for her because it was too out of the way. You want your archival systems to be in a convenient enough location so you'll use the system consistently.

Even more important than convenience is that your location provides reasonable protection for your valuable and irreplaceable documents. Papers like memorabilia, genealogy records, or other documents of high personal value to you should be stored in a dark, dry location that is safe from flooding. (The basement doesn't count!) Think high and dry—the higher you can store your documents, the more likely they are to stay dry.

DEFINE YOUR DESIRED CHARACTERISTICS

✳ **Open versus closed.** When selecting storage for your archival documents, one of the most important decisions is whether to use open storage or closed. For your archive documents, closed is often a better choice since it offers added protection from the elements. For some of your archive paper, you may want to consider archival safe storage free of acid and lignin which can degrade your

documents over time. As mentioned above, consider using a fire safe or safe deposit box for documents that would be difficult or impossible to replace.

everyday example: what I store in my fire safe

My general guideline is—what is the consequence of losing this document in a flood or fire? Can I live with this consequence? Weigh that against the cost of a fire safe or safe deposit box. In addition to the rental fee for a safe deposit box, consider the inconvenience factor—your paper isn't stored at your home.
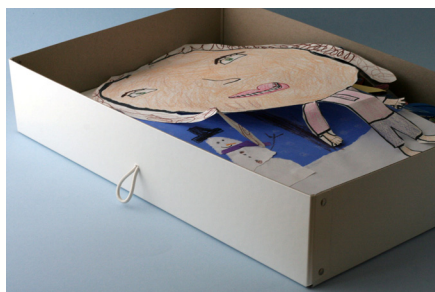
* **Ease of access.** Even though we're leaning toward closed storage for your archive documents, don't forgo ease of access altogether. If you do, you may find yourself with a tall "to-file" pile and no protection (or organization) for those important archive documents. For closed storage, ease of access can apply to the quality of the storage solution, as well as to its location in your home (which we covered above). If you're purchasing a file cabinet, for example, invest in the highest quality cabinet your budget will allow. The sturdier the cabinet, the easier it is to open the drawers and the more likely you'll be able to pull the drawers completely open, giving you trouble-free access to the entire drawer and its contents.

* **Portable versus stationary.** Consider storing the documents you would want to take with you in case of an emergency in a portable storage solution such as a binder or file sleeve, placed inside your fire safe. This will provide for portability in the instance you need to evacuate your home in an emergency, but still offer protection from fire.

  Portability is an important consideration for your memorabilia as well. If you'd like to easily browse through and enjoy your meaningful papers, consider a storage solution that allows you to transport your items to a comfortable location for viewing your documents.

* **Capacity.** The final consideration is how much space you need to store your archive documents. Once you decide which documents to store in a fire safe or safe deposit box, and which to store in a simple filing system, determine the appropriate capacity necessary to comfortably house your documents.

everyday examples: archive system storage options

File cabinet. As mentioned above, a file cabinet makes sense for many of your archive documents. It is a closed storage solution which provides added protection over open storage. When selecting a file cabinet, invest in the highest quality you can afford. If it's easy to open, you're more likely to open it (and actually file your papers away!).

Fire safe or safe deposit box. Use this solution for your most important archive documents, those you wouldn't want to be left without in the event of a fire. As mentioned above, consider putting your documents in a portable solution inside your fire safe, so they're easy to take with your in case of an emergency evacuation.

File boxes. If your file cabinet space is at a premium, consider using file boxes for items you will rarely access. For example, I use plastic file boxes for tax records from prior years.

> I keep my fire safe in the coat closet—right by the front door. If there were a fire and I needed to grab my fire safe without risk of harm, it's a handy place to make this a possibility.

Scrapbooks and binders. Because scrapbooks and binders make it easy to flip through and enjoy the contents inside, these are terrific candidates for storing memorabilia and the kids' artwork (as well as photos, but that's another workshop altogether!). If you're holding onto something strictly for sentimental reasons, it stands to reason you'll want to look at it again and enjoy it. You're more likely to pull out a scrapbook and flip through it than you are to pull out a file folder and dig through the contents. It's more relaxing and less prone to mess.

Archival safe document boxes. Archival safe boxes can be used to store oversized pieces of artwork, genealogy documents, and other items you want to preserve for the long haul.

TAKE ACTION! SELECT YOUR STORAGE SOLUTION(S)!

For each of the archive systems you need to set up, select appropriate storage solutions from the list above or choose another favorite container, taking into consideration the characteristics you need to use your system effectively.

Step 3: Develop your organizing scheme.

Your next decision is categorization. Here are some options for categorizing your papers.

STRAIGHT ALPHABETICAL

One of the simplest systems is a strictly alphabetical filing system. Each file is organized alphabetically without any other broad categorization. Even if you go with straight alphabetical, you will have to decide on categories. For example, will your car repair records be filed under "car" or "Toyota"? Will the records of the PTA fundraiser you chaired go under "PTA" or "Volunteering" or "School book sale"? Even if you don't subcategorize on a broad scale, you still have to make decisions.

CATEGORY FILES

It may make more sense in the long run if you subcategorize your files before filing them alphabetically. This allows similar papers to be stored adjacent to each other in your file cabinet. For example, you could have the following categories:

✳ **Car***—Use this category to store loan documents, car titles, and service records.

✳ **Career**—Store documents such as your resume and employment history in this section of your filing system.

✳ **School or Education**—Use this category to file your college transcript, diploma, report cards and progress reports for your own schooling and your spouse's as well as for your children. You could subcategorize this by person such as *school-Collin* and *school-Kailea*. (This category and "Career" could be combined into one section if that makes more sense to you.)

✳ **Finances*—**Store investment records, retirement planning documents, stock and bond certificates, as well as credit card agreements and account numbers in this section of your filing system.

✳ **House*—**Store your house title or mortgage paperwork along with receipts for home improvements under this category. This is also a great place to store your household inventory.

✳ **Insurance*—**Store current policies for home, auto, life and medical insurance under this category.

✳ **Legal*—**Consider this category for storing legal documents like contracts, your marriage license, birth certificates, wills, trusts, powers of attorney and the like.

✳ **Medical—**Consider using this category for storing medical records such as test results and other medical history information.

✳ **Family Members*—**You may prefer to create files for each person in your family and store their documents together, such as their birth certificates, Social Security cards, report cards, and medical records.

✳ **Pets—**Use this for vaccination records and other pet-related documents.

✳ **Taxes—**Store your tax returns and supporting documents separated by year.

✳ **Warranties and User Manuals—**Store user manuals and warranty information along with receipts in this section of your filing system.

✳ **Monthly Files—**A monthly filing system makes it simple to file away paid bill statements and even receipts. Depending on how often you clean out these files, this could be an archive system or a reference system. As a general rule of thumb, hold on to non-tax related bill statements for one year.

note:

Categories with an asterisk (*) contain documents that are candidates for storing in a fire safe or safe deposit box.

" If you like the idea of using a file cabinet, but you're afraid you'll forget where you filed things once they're put away, create a file map. A file map is a simple list of your categories and the documents filed under each category. Use the <u>file map template</u> included with the workshop handouts. "
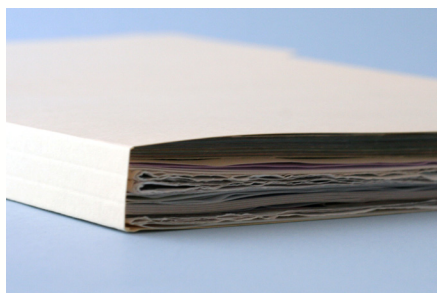
" Did you know your file folder had lines across the bottom for a reason? These score lines allow you to increase the capacity of your folder. When you're filing a lot of papers into a single file folder, use the score lines to give your folder a wider bottom—which in this case, is a good thing. "

TAKE ACTION! DEVELOP YOUR ORGANIZING SCHEME(S).
For each archival system you set up, create organizing schemes for your paper. Use one (or a combination) of the schemes discussed above based on your paper and what makes sense to you. Trust your gut, and remember you can always create your categories as you go, using the process from lesson 3.

Step 4: Identify the habits needed to use the system effectively

Below are tips to help you create a super-effective filing system. Use these tips to set up your system so it works great for you. These tips will also help you uncover any habits you need to make (or break!) to use your system effectively going forward.

FILLING SYSTEM TIPS

✱ **Pick a direction and…file!** It really doesn't matter if you file papers newest in front or newest in back. What does matter is *consistency*. Decide which way you want to do it, and then—do it!

✱ **Know the score…and what it's for.** Have you ever noticed that many file folders—especially the plain manila ones—are scored along the bottom? These scores are very helpful for keeping your files neat and tidy when your folder gets full. Simply fold your file folder at the appropriate score line, and all the papers in your file will line up neat and tidy. Pretty nifty, huh?

✱ **Put 'em in flat.** If you fold your documents before filing—consider breaking this habit. Likewise, it isn't necessary to put papers back into an envelope before filing. Folding and enveloping takes time, makes it harder to access your documents, and uses your file space less efficiently than filing documents unfolded and flat. So…put 'em in flat to save time and space.

✱ **Make it easy to create a new file folder.** In my first job out of college I had a secretary. I know what you're thinking—Aby, you're older than I thought you were. Ha! You're right. But all joking aside, Sally, my secretary, was responsible for all sorts of administrative functions, including making my new file folders. Whenever I would start a new project, I would write a note to Sally asking her to make me a new file folder. She would type the folder name into a Word

Storing a labeler, extra label tape, and empty file folders in a desk drawer makes it simple to create a new file folder!

document, print out a file label, stick it on the folder, and bring it to me…often a couple of days later! Let's talk about inefficient!

Tuck this rule in your back pocket—it shouldn't take an act of Congress, a note to Sally, or a single step away from your work station to make a new file folder! Store blank file folders and a label maker where you store your files, and make it simple to create a new folder any time you need it!

✳ **Strengthen your relationship with your recycle bin.** It always comes back to the recycle bin, doesn't it? And rightfully so. The recycle bin is one great paper clutter reducer and time saver!

Keep this in mind: the 80 / 20 rule applies to paper—just as it applies to so many other areas of your life. The average person only retrieves 20% of what they file. So don't spend your precious time setting up a filing system for documents you'll never retrieve. Instead, keep your recycle bin nearby, and see if you can send 80% of your paper to the recycle bin (or shredder!).

✳ **Color code…if it solves a problem for you.** Sure, color coding is nifty, but proceed with caution. Color coding adds a level of complication to your filing system. Color coding requires you to keep an inventory of every color file folder in your color coding system. Plus, you have to remember what your color scheme means. As with all other organizing topics, "do what works best for you" applies to color coding. If it solves a problem for you, or provides a useful visual cue about what is inside your file folders, by all means, color code! If you can't think of a good reason to color code—simplify your system. Pick one favorite color file folder and use it for everything!

✳ **Put 'em in a straight line.** Straight-line filing is when you use a single tab position for all of your file folders. The result is that all your tabs line up one behind the other. While this is counterintuitive, straight line filing actually makes it easier to find the file you're looking for. Here's why. Straight-line filing is easier on your eyes—no more jumping from various tab positions to hunt down the folder you're after. Plus, when you use multiple tab positions, two files with tabs in alignment inevitably end up one behind the other anyway.

With straight-line filing it's also easier to add and subtract categories, allowing

your filing system to evolve naturally. There's nothing more frustrating than getting a file system all set up, and realizing that you need to add a category right smack dab in between a center-tabbed folder and a right-tabbed folder. Do you put the new file behind the center tab, or in front of the right tab? Argh! Straight-line filing eliminates this maddening situation.

Straight-line filing also adds a level of simplicity—you don't have to think twice about which file tab position to use when setting up a new file, and you only have to keep one type of folder on hand. It is a bit more costly to purchase a box of single tab position folders, but I find the investment to be worth the return.

✳ **Hang 'em up…if it makes it easier for you.** Using a hanging file folder and file folder rack can make it easier to access your files. It's simple to slide your files and create space in your drawer where you need it. You also don't have to worry about file folders leaning and slipping down in a half-full drawer.

Hanging racks do, however, add an extra step to the filing process. When you create a new folder, you not only need a manila file folder with a label, but also a hanging file folder and a labeled tab. One solution is to use hanging file folders for broad categories such as warranties, and then use manila folders to subcategorize inside the hanging folder by room or by category of item—electronics, appliances, etc. If you need more than one hanging file folder to accommodate a category, simply label the front hanging file only.

✳ **Give yourself some breathing room.** A crammed file drawer makes it hard to file. When it's hard to file, you're less likely to file. Give yourself adequate room to slide your files back and forth so you can easily get your hands into and out of your file cabinets. When things start to get crowded, it's time to purge some files or move things around.

✳ **Label, label, label.** It just wouldn't be a *simplify 101* workshop if I didn't tout the benefits of labeling! As obvious as it may seem to label a file folder, you wouldn't believe the number of file folders I've seen in clients' homes with no identification on the tab! Label your file tabs 100% of the time.

❝ *Check the resource section for ideas on labelers.* ❞

If you don't have a labeler yet, now's a great time to invest in one. You'll be amazed at how good it feels to have neat and tidy labeled file folders. (And you'll be amazed at the added motivation this gives you to file your papers away!)

TAKE ACTION!

The next step is to Identify the new habits needed for your systems. As you read through the tips above, did you uncover any new habits to create or old ones to break? Make note of these habits, and one by one work on creating new habits to help you effectively use your archive systems going forward.

RECAP

Once you're finished taking action on the concepts in this lesson—all the paper in your home should have a happy home! That's right—you have now learned how to set up all four paper systems in your home—collection, action, reference and archive. Let me hear a big *woohoo* on that one! *Woohoo*!!!

There are two things I want you to keep in mind as you complete setting up your archive systems. You have at your disposal an excellent tool in the battle against paper clutter, and that tool is called the recycle bin. Don't be afraid to use it for paper you are keeping simply out of choice, rather than out of absolute necessity. Remember, 80% of what you file away will never see the light of day again! So use your time wisely, and only hold on to items you will take the time to retrieve and use again.

The second thing to keep in mind is that the archive paper you do keep has unique storage considerations. Look for storage solutions and storage locations that provide safekeeping for your important archive documents.

Nice job! You're almost there—just one lesson left to go! During this lesson we'll wrap things up. You learn about using and maintaining your systems so they continue to work well for you going forward!

Until next time,

Aby